

# CALIFORNIA WALNUTS

2024-25 ANNUAL REPORT







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## State of the Industry: 2024-25 in Review

By: Robert Verloop, Executive Director and CEO, California Walnut Board and Commission

The 2024 short crop, with minimal carry in, presented unique challenges for handlers who had to maximize sales to high-value, loyal customers, while not distancing themselves from other buyers. With the light volume, the average farm gate value for Chandler hit a six-year high of \$0.961 per pound, as reported in the 2024 CDFA NASS Walnut/Raisin/Prune Report. Despite best efforts, traditionally strong inshell markets could not secure enough California walnuts to satisfy demand and buyers turned to competitive growing regions. Now six months into the 2025 crop year, we have seen these buyers come back to secure high-quality California walnuts.

### **Global Leadership**

California walnuts are earning their place around the world. Globally, consumption of walnuts is on the rise, and the California industry is working together to expand access and address trade barriers (including reductions in tariffs), strengthen existing markets and develop new ones.

In support of these goals, the California Walnut Commission (CWC) is engaging elected officials, agencies and foreign trade partners. While trade policy continues to influence markets, potential sales abroad are ripe with opportunity. In particular is India, which has had a 100% tariff on all walnuts since 2018. With a reduction in this tariff, and a middle class of over 400 million with increasing purchasing power, improved infrastructure and growing demand for premium healthy foods, the potential for India to become our largest export market cannot be underestimated.

The CWC continues to pursue the United States Department of Agriculture's (USDA) Market Access Program (MAP) grants, used to elevate sales in Asia, Europe and the Middle East. In recent years, the Regional Agricultural Promotion Program (RAPP) provided new market development funding for Taiwan, Singapore, Malaysia, Morocco, Vietnam and other emerging markets. This year, CWC supported trade missions and education programs for handlers to gain knowledge about these emerging markets. New market development and growth in existing markets will help the industry moderate production swings.

### **Repositioning California Walnuts – 'More than grandma's banana nut bread'**

Around the globe, there is a "repositioning" of walnuts to make them modern and relevant. Domestically, the message "California Walnuts. Feel Good," is complemented with a fresh, energetic and more youthful visual identity. As part of this work, walnuts are being touted well beyond their baking and functional benefits and instead being showcased as a lifestyle brand.

At retail, the repositioning is a physical one, with a focus on moving California walnuts beyond the baking aisle and into the fresh produce and snack sections. This means working with retailers on larger year-round displays, cross-merchandising and co-marketing promotions. With our team of retail merchandisers, we are demonstrating that consumers respond to promotional events and creating sales velocity to move walnuts off shelves.

With over 50% of the U.S. food dollars going to “out-of-home” foodservice operations, we have a comprehensive program to educate, encourage and engage chefs and restaurant operators on the benefits of walnuts on their menus. Flavor, texture and aroma are at the center of the foodservice, culinary and food manufacturing marketing efforts, and we have developed new tools including the California Walnuts Flavor Wheel (Page 17) to help.

### ***Quality is Foundational to Success***

Quality continues to be the backbone to successfully growing sales and incremental consumer demand. Growers who continue to invest in best practices in orchard management will be rewarded with more consistent crops and reliable quality scores. We know this can be a difficult and increasingly costly task — but it’s an important one, as competition from lower-cost competitors will continue.

The California Walnut Board (CWB) is supporting production and postharvest research with a focus on ensuring a fresh, long “taste life” — a concept that moves beyond the need to maintain shelf life and focuses on maintaining flavor and a positive eating experience.

Domestically, we developed a retail quality monitoring program to identify how improvements can be made across the supply chain, with a scorecard to be shared with handlers. This focus on quality improvement will enable handlers to form even deeper relationships with retailers for faster pull-through and better handling.

At the Board and Commission, our focus remains on grower prosperity. That means getting more people to enjoy more California walnuts in more ways, more often and at a price that reflects the care and quality behind every nut. Achieving this doesn’t happen overnight, but through coordinated marketing, strategic market development and a shared commitment to excellence, we can create a brighter outcome for California walnuts.

As always, I welcome your questions and comments at [rverloop@walnuts.org](mailto:rverloop@walnuts.org) or 916-932-7070.

Regards,

**Robert Verloop**  
Executive Director & CEO





## Chairmen's Message

As most growers know, the 2024 crop brought in better pricing for California walnuts than we've seen in years. But we also know that farming is a tough business, and Mother Nature and market dynamics can create challenges. As we reflect on the year behind us, we acknowledge that while crop sizes and markets can shift year over year, the industry — by working together through the California Walnut Board and Commission — is making important progress that will set us up for success over time.

This work continues to be grounded in the strategic plan developed by growers and handlers. As chairmen, we, along with our full boards and the staff, use this plan as our "North Star." By working together, momentum is building.

We're seeing encouraging movement in several established markets, and our participation in federal export programs such as MAP and RAPP is helping us open doors in developing markets, expanding opportunities for California walnuts around the globe. An example of this is the United Kingdom, where we leveraged MAP funds and have increased exports and grown the country into a top 10 export market.

While diversifying the markets in which we sell California walnuts is paramount to success, a promising opportunity ahead is India, where we believe a reduction in duties could create meaningful room for growth and help improve returns for growers. With other major walnut-producing countries becoming more aggressive in key markets, expanding our reach in India as well as leveraging government funding to develop new demand in a variety of export markets will be increasingly important to support current production levels.

While retail growth in the United States remains modest, we are making progress by increasing the frequency of promotions and placements of walnuts in produce to support year-round sales growth.

Our marketing efforts are focused on making walnuts an important part of lifestyles and daily meals — particularly with a new, younger audience — by emphasizing accessibility, taste and easy ways to use walnuts. We also continued investing in health research that reinforces the health and wellness benefits of eating walnuts. New studies on sleep and gut health are helping us tell a simple, compelling story about why walnuts belong in more households, a story that all growers and handlers should be echoing.

Looking ahead, we need to stay focused on delivering the best-tasting walnuts possible and work together to ensure the entire industry can be profitable. Even though 2024 crop prices were strong, many growers continue to feel the pinch. Continued coordination between growers, handlers and the Board and Commission is essential to improving returns and sustaining the industry for the years ahead.

**Jack Mariani**  
**Chair**  
California Walnut Board

**Davin Norene**  
**Chair**  
California Walnut Commission



# California Walnuts Strategic Plan 2023–28

## Mission

To collaborate with the California walnut community to drive grower prosperity.

## Vision

Consumers around the globe crave California walnuts.

## Values

At the California Walnut Board and Commission, we:

- Embrace a consumer mindset: We prioritize consumers’ current and future needs, concerns and interests to build lifelong purchasers of California walnuts.
- Act with urgency while thinking for the long term: We embrace opportunities, seek solutions to challenges and continuously improve to create a thriving California walnut industry.
- Engage in open and honest dialogue and communicate transparently: We regularly engage growers, handlers and other industry partners and invite them to collaborate to advance our vision.
- Build trust and hold ourselves accountable: We serve as good stewards of grower funds and use data to hold ourselves accountable and inform what we do and how we do it.

## Strategic Priorities (Pathways to Achieve Our Vision):

1. Deliver the best-quality California walnuts.
2. Activate sales of California walnuts through global marketing.
3. Foster innovation to decommoditize California walnuts.
4. Define our sustainability story as a point of differentiation.
5. Support goal-oriented research to improve production and postharvest practices.
6. Revitalize the Board and Commission to build industry cohesion and align the industry on advocacy efforts.





## ISSUES MANAGEMENT & GOVERNMENT ADVOCACY

Issues management and government advocacy remain central to protecting market access for California walnuts around the globe. By monitoring global regulations, addressing technical and trade barriers such as MRLs and tariffs, and engaging with policymakers in key export markets, the industry is working to prevent disruptions and support grower competitiveness. Over the past year, these efforts helped safeguard supply chains and strengthen the industry's position in an increasingly fluid trade environment.

## Addressing MRLs to Keep Markets Open

Meeting global technical and regulatory trade requirements such as maximum residue levels (MRLs) remains essential to keeping California walnuts moving smoothly into international markets. The CWB and CWC continue to monitor MRL requirements and work with partners worldwide to prevent trade disruptions before they occur.

Since 2024, the CWB has partnered with USDA's Assisting Specialty Crop Exports initiative to strengthen the industry's ability to navigate changing pesticide regulations. Through this collaboration, the California walnut industry gains early insight into new and upcoming MRL adjustments around the globe, helping handlers and importers avoid costly rejections or delays at foreign ports. A key outcome of this work is a new USDA global MRL datasheet for walnuts, available at [walnuts.org](http://walnuts.org), which provides the latest MRL requirements by market to support informed pest management decisions.

The European Union remains one of the most challenging markets for pesticide-related compliance. Ongoing scientific reevaluations of active ingredients, combined with strict "cutoff" criteria, often lead to MRLs being lowered even after the crop has been produced

or harvested. These sudden policy shifts present real risks for California walnut exporters. To improve early visibility and reduce potential disruption, the CWC is engaged with an export tree nut working group to obtain significant compliance trends and indicators, and insight into evolving biopesticide policies, as well as raise awareness on crop protection efforts and risk management practices by growers.

Regulatory changes at home can also affect export readiness. The CWB and CWC closely follow the California Department of Pesticide Regulation's (DPR) agenda as it implements requirements under Assembly Bill 2113 and the state's Sustainable Pest Management goals. Beginning in 2025, DPR launched a new pesticide prioritization process, a data-driven framework for reviewing pesticides, evaluating risks and determining mitigation actions and timelines. To ensure walnuts are represented in discussions on these measures, the CWB nominated a longtime walnut pest management researcher from the University of California Cooperative Extension to participate. Their involvement helps provide a science-based voice for the California walnut industry and supports the continued availability of critical crop protection tools.

## Navigating Tariffs to Protect Market Access

Global trade policy remains fluid, and the CWC continues to work with U.S. and international partners to advocate for tariff policies that support California walnut growers and handlers.

In India, California walnuts still face a 100% tariff, and negotiations have not produced a reduction. The CWC remains engaged with the Office of the United States Trade Representative (USTR), USDA, trade officials and Indian stakeholders to pursue solutions. The high duty has pushed some product through alternate channels, and India's newly formed Nuts and Dry Fruits Council is urging its government to reconsider the tariff or adopt a quantity-based system similar to other nuts.



In the European Union, final approval is still pending on a proposed 500,000-metric-ton, zero-tariff quota for nuts. The CWC continues working closely with EU trade



associations such as FRUCOM while waiting for the final proposed trade agreement vote to emphasize the importance of reliable U.S. walnut supplies.

Turkey removed its 10% retaliatory tariff in September while keeping the base 15% duty in place, improving shipment movement.

In May 2024, the CWC and a walnut industry delegation traveled to Washington, D.C. to educate, inform and remind regulators and California Senators and Congressmen about the importance of having open access to all markets, with India being the highest priority. Additionally, the CWC has participated in USDA

trade missions led by Secretary Rollins in the UK and India to discuss ways for USDA to support agricultural exports through trade promotion programs and demonstrate the success the California walnut industry has achieved in building sales through leveraging government funding programs, such as MAP.

With tariff uncertainty ongoing, the CWC continues to work with various stakeholders – USTR, USDA, legislative and other key officials – and advocate on behalf of growers and handlers to inform on the benefits of removing tariffs in key walnut markets.

## MAP, RAPP Funding Support Global Marketing

The Market Access Program (MAP) and Regional Agricultural Promotion Program (RAPP) are important resources provided through the USDA's Foreign Agricultural Service (FAS) to provide funding to support domestically grown agricultural products and build export markets through overseas marketing and promotion. Each year, the CWC takes part in a competitive bid process to maximize the dollars awarded through these programs.

For fiscal year 2025, more than \$172 million was awarded to 68 organizations via MAP funding, including the CWC, which received more than \$3.5 million to support consumer advertising, public relations, point-of-sale promotions, participation in trade fairs and market research.

Similar to MAP, RAPP is designed to build demand for American food and farm exports in high-potential global markets, focusing on Africa, Latin America, the Middle East and South and Southeast Asia. This funding, which was first launched in 2023, is available to U.S. exporters to build demand for American food and farm exports in countries where the middle class is growing and the desire for high-quality food and farm products is increasing.

In fiscal year 2025, the CWC was awarded \$7 million from the USDA under the second phase (tranche)

of RAPP, bringing the total with 2024 funding to \$14 million. Of this, \$7 million must be spent by September 2029 (\$1 million must be used in Africa) and the other \$7 million by September 2030. The CWC's focus continues to be on expanding distribution and sales in select countries in Southeast Asia and Northern Africa, in addition to expanding trade promotions in several key existing markets. Gaining market share will help the industry to better weather global shocks and compete in an increasingly volatile marketplace. The program funding for fiscal year 2025 is available starting with the 2025/26 crop.

Complementing MAP and RAPP is the America First Trade Promotion Program (AFTPP). Introduced immediately following fiscal year 2024/25, the program adds flexible funding that helps U.S. agricultural exporters maintain relationships and seize more timely market opportunities while expanding capacity for export promotions. The CWC will be closely monitoring this program in 2025/26 for additional funding opportunities.



A photograph of a person in a blue and white striped shirt holding a small orange bowl filled with walnuts. They are offering a piece of walnut to another person whose hand is visible in the foreground. The background is slightly blurred, showing a person's face and a tiled wall. An orange circular graphic is overlaid on the left side of the image, containing the text 'GLOBAL MARKET DEVELOPMENT'.

**GLOBAL MARKET  
DEVELOPMENT**

## Driving Demand in Key Markets

California walnuts, shipped to 80 countries around the globe, continue to gain traction worldwide thanks to strong trade relationships, the industry's ongoing commitment to quality and impactful global marketing. By leveraging federally funded grant dollars, including those from MAP and RAPP, the industry is opening doors in new high-potential markets.

### Redefining Walnuts on the World Stage

No matter where consumers are, the California walnut industry is working to make walnuts modern and relevant. In the United States, this means targeting younger shoppers and positioning California walnuts as a produce item that helps them feel good. In Europe, walnuts are connecting with cultural traditions and recipes. In Asia, California walnuts are showing up in popular media. And retail programs worldwide are encouraging sales in unique ways across each market. Innovation is also central to efforts to redefine walnuts, as chefs and food manufacturers are being encouraged to discover the power of California walnuts as a versatile ingredient. Across all markets, the goal is to position California walnuts as a healthy, contemporary, flavorful, essential part of everyday eating.



Global marketing for California walnuts engages every link in the supply chain, including California handlers, importers, retailers, foodservice professionals, food manufacturers and consumers with an aim on advancing the industry-developed vision to make California walnuts craved around the globe.

During the last year, the CWB and CWC not only executed unique programs in each region in which it operates but also welcomed global influencers and media from eight international markets to California for the 2025 Harvest Tour. Delivering an immersive orchard-to-table experience, attendees observed harvest up close – from shaking trees in the orchard to hulling, drying and processing – and learned firsthand from growers and handlers how precision and care at every stage ensures California walnuts are a premium product in the global marketplace. The tour not only built lasting connections to support global demand and reinforce the industry's reputation for excellence but also helped cement California walnuts as the preferred choice for walnuts around the world.



# NORTH AMERICA

California Walnuts captivated and energized younger consumers in North America through a new look and feel and messaging, inspired chefs and culinary innovation with the California Walnuts Flavor Wheel, and accelerated retail growth in the United States and Canada with targeted digital promotions. These efforts elevated California Walnuts to be modern and relevant in consumers' lifestyles.



## Creating a Lifestyle Brand With Younger Consumers

In the United States, California Walnuts is aiming to move beyond “your grandma’s banana nut bread” and the baking aisle and into the daily lifestyles of younger consumers by showcasing the power of walnuts to help them feel good. The research-fueled effort includes a fresh, energetic and more youthful visual identity that reaches younger consumers where they are: on digital and social media, where dozens of social media influencers are talking about the feel-good power

of California walnuts. The program, which leverages nutrition research while appealing to the holistic view of wellness embraced by younger consumers, is also supported by paid media and in-person experiences at wellness and lifestyle events. In its first year, the “Feel Good” effort was able to reach millions of Gen Z and millennial consumers that represent the next generation of walnut lovers.



# EUROPE

California Walnuts energized several European markets with holiday magic in Spain, bold eye-level displays in United Kingdom grocery aisles and plant-forward recipe promotions in Germany. These efforts sparked consumer excitement, drove sales and further cemented walnuts as a versatile, nutrient-packed option.



## California Walnuts Bring Holiday Magic to Spain's Festive Season

If you visit Madrid during the holidays, chances are you will find yourself at La Navideña Christmas Market in the city's Plaza de España, one of Spain's most iconic seasonal celebrations. Walnuts have a strong foothold in the Mediterranean diet, making Spain an important market, but competition is intense. To keep California walnuts top of mind, the CWC brought holiday magic to La Navideña in December 2024 with a vibrant campaign that combined tradition and creativity, making walnuts a memorable part of Spanish festivities.

A towering nutcracker welcomed visitors, while a still-walking nutcracker handed out samples and recipe

cards, showing consumers that walnuts are more than an ingredient, but also part of the holiday magic.

The campaign also tapped into trends shaping Spanish food culture, such as social sharing and experiential dining. Instagrammable moments and a dedicated hashtag amplified visibility, while on-site dining reinforced the versatility of California walnuts.

By blending tradition with modern engagement, the CWC reinforced the value, taste and versatility of California walnuts during the festive season, reaching nearly 5 million consumers.

## California Walnuts Tap into UK Food Culture

Healthy snacking with California walnuts took the spotlight in UK grocery aisles last winter as the CWC partnered with Iceland Foods, one of the country's leading supermarket chains, to bring California walnuts front and center.

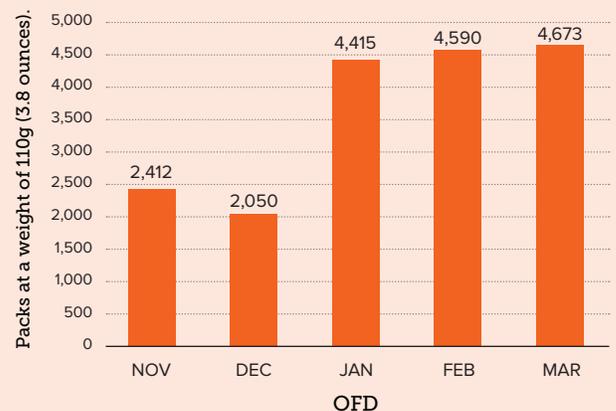


For six weeks starting in January 2025, special displays in 720 Iceland stores showcased California walnuts in top-shelf, eye-level positions, a strategic move that aligned with shopper trends favoring healthy snacking and plant-based ingredients. Dynamic wording about the health benefits of walnuts captivated consumers, with phrases like “immense nutrient power crammed into a tiny handful” clearly visible. Sales rose 117% across all stores during this time, proving these displays

create a strong visual presence that reinforces walnuts as a versatile, everyday choice.

The effort tapped into a broader shift in UK food culture, where consumers are increasingly seeking nutrient-rich options that fit into balanced lifestyles. These efforts lay the foundation for long-term growth, ensuring California walnuts remain top of mind for UK shoppers well beyond the winter season.

### UK Off Display Unit (OFD) Sales 2025



Pack sales post OFD reached an average of 4,559 packs - an increase of 104% average sales over pre OFD sales

## Plant-Forward Push in German Cuisine Creates Opportunities

Germany's appetite for plant-forward products continues to grow, and California walnuts are at the center of this trend. In November 2024, the CWC teamed up with REWE, one of the country's largest retailers, for a two-week promotion that put walnuts in the spotlight as a versatile meat substitute.

The effort featured bold e-commerce banners in REWE's online store, recipe card sampling in physical locations and a dedicated webpage called the California Walnut Recipe World. Shoppers discovered creative takes on classic German dishes, including vegan walnut Köttbullar (classic Swedish meatballs), stuffed peppers, cabbage rolls, Königsberger meatballs and walnut-spinach dumplings in mushroom cream sauce. The campaign built on last year's efforts, which

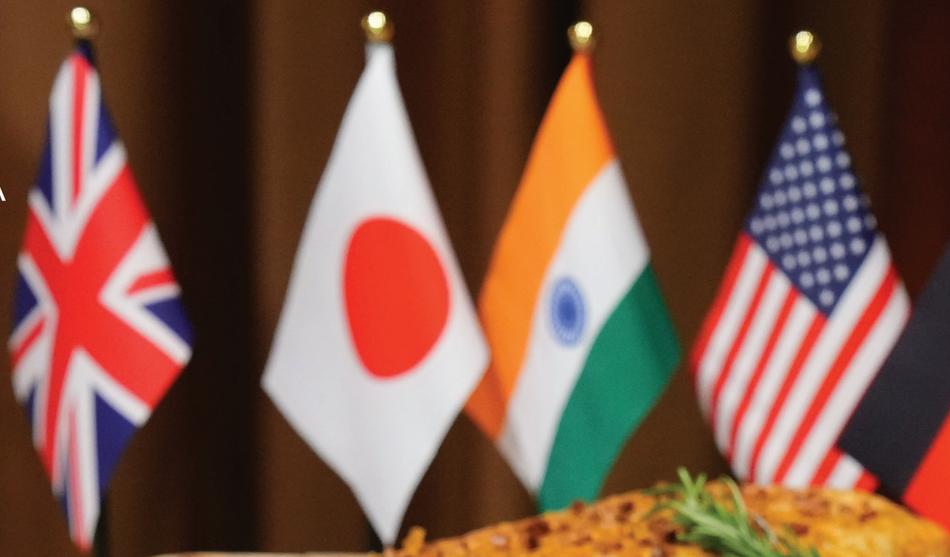
also showcased California walnuts as the perfect ingredient for meat and dairy alternative recipes.

Engagement was strong, with banner ads viewed more than 543,000 times and recipe pages attracting 4,300 visits. Most importantly, sales of California walnut kernels in REWE's online store rose 9% during the promotion, underscoring growing demand for plant-forward products.

By tapping into Germany's evolving food culture, California walnuts are being positioned as a premium, nutrient-rich ingredient. This was evident in 2024, when sales grew despite a smaller crop and built momentum for continued growth in this key market and the surrounding region.

# ASIA AND SOUTH ASIA

California Walnuts advanced its presence across Asia by hosting the Japan World Walnut Summit, tapping into festive-season demand in India and driving culinary innovation in Korea. Strategic partnerships and cultural relevance strengthened leadership in these established and rapidly growing markets.



## World Walnut Summit Keeps Walnuts Top of Mind in Japan

Japan is one of California walnuts' most loyal markets, but when walnuts were added to the country's mandatory allergen labeling list in April 2025, the California walnut industry moved quickly to protect consumer confidence and keep demand strong.

To counter potential concerns, the CWC organized the Japan World Walnut Summit, held in April 2025 in Tokyo. The event brought together leading scientists, health professionals, media and influencers to spotlight the benefits of California walnuts. Experts shared the latest research on cognitive health, gut health and sleep quality, topics that resonate strongly with Japanese consumers. California growers and processors also engaged with media, sharing their family farming stories

and the passion of growing and preparing California walnuts for consumers around the globe.

The summit garnered more than 340 attendees, extensive media coverage and an estimated reach of more than 13 million consumers, more than 12% of Japan's adult population. Following the event, walnut sales surged 18.3% compared with the previous year, proving the impact of proactive engagement.

By educating consumers and celebrating California walnuts' health and flavor story, the CWC and industry members were able to increase sales and continue to keep California walnuts top of mind.

## From Stores to the Sky, California Walnuts Tap into the Indian Marketplace

India continues to be a major growth opportunity for California walnuts, and 2025 efforts paid off with strong results delivered. To drive consumption and strengthen presence, the CWC partnered with Reliance Retail, India's largest grocery chain with more than 7,000 locations and 150 million customers. For two months, California walnuts were featured in high-traffic stores across Delhi-NCR, Mumbai and Uttar Pradesh, areas chosen for their purchasing power and growth potential. The promotion included eye-catching displays, floor stacks and walnut-shaped cutouts that stood out in stores and encouraged shoppers to try California walnuts.

The result: California walnut sales at Reliance jumped 120% compared to before the promotion, with gains in both in-shell and kernels, showcasing the potential for walnuts in India, where health-conscious consumers are increasingly looking for nutritious, plant-based options.

California walnuts also took to the sky with Air India, India's flagship airline. During peak travel season, branded walnut snack packs were served on select flights, putting the product directly in the hands of

premium travelers. This effort sparked major buzz when a leading influencer shared the experience, generating more than 1 million social views. Passenger feedback praised the taste, freshness and health benefits, reinforcing California walnuts as the go-to premium snack for travelers.

By combining retail power with premium touchpoints, these initiatives are opening doors for California walnuts in one of the world's most promising markets and creating opportunities for long-term demand and value for the industry.



## Hit Korean TV Show Drives Demand for California Walnuts

For more than 30 years, the CWC has worked to keep California walnuts top of mind in Korea, and in 2024 continued that effort with meaningful results by partnering with the hit KBS TV show Pyun-restaurant, where celebrities create original dishes that later become ready-to-eat meals sold nationwide.

Actress and singer Jung-hyun Lee spotlighted California walnuts in two creative recipes: lemon cream walnut bread and walnut garlic stem rice bowls. The show highlighted walnuts as an excellent source of plant-based omega-3 ALA<sup>1</sup> (2.5 grams per ounce) and their role in supporting brain health for children and

older adults. Lee's walnut garlic stem rice bowl stood out for its flavor, texture and simplicity, making it a favorite for home cooks.

The dish was quickly developed into a ready-to-eat meal and launched in thousands of GS Retail convenience stores nationwide. The program drew strong engagement, earning 600,000 TV viewers and 145,000 YouTube views. During the two-week promotion, more than 60,000 units were sold, using about 1.2 metric tons of California walnuts and reinforcing demand and innovation in the Korean market.

<sup>1</sup>A one-ounce serving of walnuts provides 18g of total fat, "good fats" including 2.5g of monounsaturated fat and 13g of polyunsaturated fat (of which 2.5 grams is plant-based omega-3 ALA), as well as 1.5g of saturated fat.

# MIDDLE EAST AND NORTH AFRICA

California Walnuts advanced market development across the Middle East and North Africa in 2024/25 through high-impact initiatives, building trade relationships in Morocco, celebrating World Walnut Day in Türkiye and showcasing culinary versatility at Gulfood in Dubai. These efforts strengthened brand presence, drove preference through cultural relevance and unlocked growth opportunities in this evolving region.

## California Walnuts Lay Important Groundwork in Morocco

Morocco is stepping into the spotlight as a vibrant new frontier for California walnuts. In December 2024, the CWC joined a USDA trade mission to Morocco and later secured a trade representative agency to help develop the market. Webinars provided valuable insights on global trade finance, risk solutions and freight connections in the region.

In 2025, the CWC has planned a walnut-focused trade

mission to Morocco supported by RAPP, with visits to El Kelaa to observe nut processing operations, tours of retail outlets in Marrakesh and Casablanca, and one-on-one meetings with importers, distributors and key trade contacts. This initiative is an important step toward building strong relationships between the California walnut industry and Morocco, laying the foundation for future market growth.

## Türkiye Celebrates World Walnut Day

Türkiye rolled out the red carpet for California walnuts on World Walnut Day on May 15, 2025, celebrating with the hotel, restaurant and cafe sector, a cornerstone of the country's thriving tourism industry. Tourism accounts for about 8% of Türkiye's GDP, and with 26.4 million visitors in the first half of 2025 and projections of 65 million by year-end, the hospitality sector offers significant opportunity for California walnuts.

The day featured presentations on California origin excellence, nutrition and health benefits, and culinary applications. Anatolian Tourism Operators Association President Birol Akman discussed the relationship between the tourism sector and gastronomy, with a particular focus on the importance of Ankara and Anatolian cuisine in the context of gastronomic tourism. Akman highlighted how integrating walnuts into traditional dishes bridges heritage with health, reinforcing cultural relevance and premium quality.

Engagement was strong, with 47 Instagram posts generating 1.6 million views and more than 50,000 interactions, plus coverage in Hürriyet, one of Türkiye's leading newspapers. A supporting media campaign



amplified the message, reaching 217 million views across major Turkish outlets. This substantial reach and cost-effective exposure confirmed the growing acceptance of California walnuts as a nutritious, flavorful and versatile food choice, cementing their presence in the Turkish market and demonstrating the power of strategic media partnerships to drive California preference and purchase.

## California Walnuts Drive Engagement at World's Largest Food Show

The CWC strengthened California walnuts' standing in the Middle East at Gulfood, the world's largest annual food and beverage trade show, held in Dubai in February 2025. The event attracted more than 140,000 buyers and 5,500 exhibitors from nearly 200 countries, underscoring the region's growing influence on global food markets.

The CWC's booth served as a hub for engagement, where Chairman Davin Norene, CEO Robert Verloop and marketing staff welcomed more than 230 traders and food professionals and engaged in in-depth discussions about new opportunities for California walnuts in global markets. Nonexhibiting handlers also

used the space for one-on-one meetings, ensuring broad industry representation.

A highlight of the week was a one-day master class featuring renowned chef Nicholas Poulmentis, who demonstrated innovative uses for California walnuts, including a baklava recipe. The session drew professional chefs and key food industry players, showcasing walnuts' versatility and gastronomic health potential.

The CWC also partnered with Dubai's International Centre for Culinary Arts to spotlight walnuts' role in the growing hospitality sector, reinforcing their value in global cuisine.



## GLOBAL HEALTH & NUTRITION

Health and nutrition research continues to uncover powerful health drivers for increasing California walnut consumption. By providing financial support through grants or walnut samples, and communicating the results of credible, evidence-based studies, the industry is positioning walnuts as a scientifically validated choice for health and wellness. Over the last year, these findings were amplified through registered dietitians, health professionals, media and influencers, ensuring walnuts remain top of mind for consumers around the globe.

## Emerging Research Focuses on Hot Topics: Sleep and Gut Health

Walnuts have a long-recognized health halo in the minds of health professionals and consumers alike, driven by more than three decades of research showing the health benefits of walnuts. In 2024/25, the CWC supported nine published studies on topics including cognitive health, sleep, cancer and more. Two noteworthy publications focused on trending topics of sleep quality and colon cancer.

A study at the University of Barcelona headed by Dr. María Izquierdo looked at how eating walnuts affects sleep in healthy young adults. Participants ate about 40 grams of walnuts each day for eight weeks. Researchers found higher levels of melatonin, a hormone that helps regulate sleep, and improvements in how quickly participants fell asleep and their overall sleep quality compared to a control group that did not eat walnuts. While other sleep patterns stayed the same, the results suggest walnuts could be a simple, natural way to support better rest.

Experts believe sleep benefits come from nutrients<sup>1</sup> found in walnuts, such as tryptophan (84.6 mg) – a precursor to melatonin, plant-based melatonin (118 ng), magnesium (45 mg) and B vitamins (0.2 mg each vitamin B5 and vitamin B6), making walnuts a strong option for food-based approaches to supporting healthy sleep. Additional research may be needed to support these results.

To promote the release of the study, the CWC organized a press breakfast in Barcelona with journalists from

leading media outlets. The breakfast highlighted key findings, and Dr. Izquierdo announced plans for a second phase focused on women in menopause, sparking interest among attendees. The event generated significant media coverage and influencer engagement, including an article in the well-established *El Periódico*.

A study from the University of Connecticut explored how walnuts may help reduce the risk of precursors to colon cancer among adults aged 50 to 65. For three weeks, participants ate about a handful (28 grams) of walnuts daily before a routine colonoscopy. Researchers found beneficial shifts in inflammatory markers and positive changes in colon polyp tissues after participants ate walnuts. Benefits were especially strong among participants who produced higher levels of urolithin A – a gut-derived compound formed from walnut polyphenols. These findings suggest that walnuts may help support gut health and positively influence biological factors linked to colorectal cancer risk. Since this exploratory study did not include a traditional control group and relied on internal comparisons, a larger NIH-supported clinical trial is currently ongoing to build upon this early evidence.

Looking ahead, expanding research into lifestyle and wellness areas such as mental health, cognitive function, stress management and more will align with consumer priorities and position walnuts as a go-to choice for everyday well-being.

<sup>1</sup>A one-ounce serving of walnuts provides 18g of total fat, "good fats" including 2.5g of monounsaturated fat and 13g of polyunsaturated fat (of which 2.5 grams is plant-based omega-3 ALA), as well as 1.5g of saturated fat.





## Leveraging Health and Nutrition Research

Health and nutrition research continues to be a powerful storytelling engine for walnuts, strengthened by walnuts' versatility and ability to fit within consumers' daily lifestyles. While past research continues to show up in headlines and be discussed among health professionals, emerging research in areas such as gut health, sleep and more serves as a tool for additional outreach and education.

In one example, CWC's Eat the Science virtual workshop series, which blends health and nutrition research with practical cooking demonstrations, saw record attendance in 2024/25, attracting more than 2,200 health professionals. The workshops covered topics such as walnuts' scientifically proven benefits for heart, brain and gut health as well as overall wellness.

The CWC also elevated global walnut research by hosting the Global Walnut Health and Nutrition Science Summit. This multi-day event brought together 25 leading nutrition researchers and registered dietitians from around the world to review the science, set



priorities for future research and collaborate on ways to communicate findings in clear, compelling ways. By equipping thought leaders with tools and messaging to translate complex findings into consumer-friendly narratives, the summit amplified the reach and impact of walnut research. These efforts ensure health professionals and others can confidently advocate for walnuts, strengthening the industry's voice in the health and wellness conversation.

## Walnut Science Used to Inform Policy and Government Affairs

Nutrition took center stage over the last year as efforts such as Make America Healthy Again and revisions to the Dietary Guidelines for Americans (DGAs) were underway, shaping the future of healthy eating and food and nutrition policy. During this critical time, the CWC's scientific affairs program continued to elevate awareness of the robust scientific evidence that demonstrates the value of walnuts in improving Americans' health and nutrition security.

In 2024/25, the CWC submitted research on walnuts' role in supporting health during public comment periods for key nutrition policy initiatives, including the 2025-2030 DGAs, which help inform national feeding

programs like the National School Lunch Program, the Supplemental Nutrition Assistance Program (SNAP) and more. In addition, in February 2025, walnuts were found to meet the U.S. Food and Drug Administration definition of foods that can be labeled as "healthy," following ongoing efforts by the industry to educate policy decision-makers about the role of walnuts in healthy eating patterns.

While the recent year was positive for walnuts, changes to food and nutrition policy continue to unfold, and the CWC is committed to ongoing efforts to ensure policymakers remain informed about the health and wellness benefits of walnuts as new research emerges.

A photograph of two men in a walnut orchard. The man on the left is wearing a dark jacket, a green and white cap, and glasses, and is reaching up to touch a branch. The man on the right is wearing a light blue checkered shirt and a white cap, looking up at the trees. The background is filled with lush green walnut trees.

## PRODUCTION & POSTHARVEST RESEARCH

California's walnut industry is driving innovation from orchard to shelf. Research is tackling critical production challenges like nematodes and other pests while advancing breeding for improved nut quality and shelf life. Postharvest initiatives are raising standards for retail product quality and authenticity. Together, these efforts support grower profitability and buyer and consumer confidence in California walnuts around the globe.

## Driving Solutions for Nematode and Other Pests and Diseases

California walnut growers face an existential challenge in nematode management, specifically root lesion nematode, a pest found in roughly 85% of orchards. Even low populations can cause significant damage, leaving growers “between a rock and a hard place.” Traditional fumigation with 1,3-dichloropropene has become more costly and complex under new regulations, while alternative treatments remain in development.

Recognizing the urgency, the CWB convened a task force to accelerate solutions. Recent progress includes the impending release of a University of California-developed nematode-resistant rootstock, with additional candidates in the pipeline. In parallel, a team at UC Davis secured a major state-funded grant to engineer rootstocks with enhanced resistance. These efforts aim to provide durable defenses against nematode pressure. The task force is also crafting a strategy to raise government and regulatory awareness of the severity of nematodes’ economic impact, and identify what current research shows, known research gaps and funding opportunities to build knowledge around alternative solutions and practices, and educational opportunities.

Beyond nematodes, other pest and disease management solutions are seeing results. Emerging research is showing in-season fungicide applications are effective in reducing kernel mold at harvest. Walnut blight management now includes new copper formulations, alternative copper and non-copper products, plus biological and natural solutions. Meanwhile, a promising walnut husk fly pheromone attractant could improve spray efficacy, enhance sticky-trap monitoring and enable attract-and-kill strategies, critical steps toward integrated pest management for California walnuts.

## Breeding Program Drives Next-Gen Varieties

Research is zeroing in on breeding advancements to deliver California walnut varieties with improved traits and longer shelf life. Kernel size, light color, crackability and filling remain important, and new efforts through the Walnut Improvement Program at UC Davis are targeting breeding varieties with lower rancidity potential.

UC Wolfskill, released in 2021, also continues to gain traction, and a new midseason variety expected to replace Vina with better color, edible yield and blight resistance will be available in early 2026. Another project is investigating why edible yield has declined in Chandler and other varieties over recent decades. Foundational research on kernel color and reducing rancidity and improved shelf life/taste life will enable advanced genetic tools, including CRISPR, to accelerate development of superior walnut varieties.

## Postharvest Initiatives Take Aim at Walnut Quality

With quality as a defining factor in differentiating California walnuts around the globe, the Quality Improvement Program is supporting efforts to understand quality at point of purchase and promote authentic California walnuts worldwide.

Domestically, the CWC is conducting retail surveys. In June 2025, random samples analyzed by the National Food Laboratory provided a snapshot of quality in California stores. A scorecard now tracks appearance, packaging integrity, color, peroxide value, free fatty acids and shelf life, giving handlers a benchmark against industry averages. This annual survey will expand to major U.S. cities, including but not limited to Chicago, New York, Austin, Miami and Boston.

Another initiative uses Oritain’s forensic science to independently verify product origin by analyzing the unique chemical finger print of walnuts, thus allowing verification of whether a walnut is grown California. This science-based approach could help identify suspected origin mislabeling, opening the door to address violations with appropriate governments down the road.



## SUSTAINABILITY

California walnut growers understand what it takes to grow a healthy product — but today, many buyers and consumers are focused not only on product attributes but also who is producing it, and how it is produced. It falls on the industry to share the story of responsible farming and environmental stewardship. To support this, the CWB and CWC continue to develop, monitor and communicate sustainability data to a range of audiences, while equipping the industry to meet rising expectations with the goal of differentiating California walnuts and strengthening market competitiveness.

## Turning Stewardship into Data: Defining Sustainability for California Walnuts

California walnut growers have always taken great care in how they grow. From keeping soils healthy to reducing inputs and minimizing waste, many practices embraced for generations meet the expectations of sustainable agriculture. Now, together with the industry, the CWB and CWC look to tell this story through quantifiable metrics that demonstrate the industry's work and commitment to the land, environment, people and local communities, which are becoming increasingly important to domestic and international buyers and consumers.

In 2025, this included collecting data from growers and providing agronomic advancement and best practice tools through education, with emphasis on peer-to-peer learning. The CWB also maintains a list of grants and assistance programs on walnuts.org that can help offset costs for growers implementing these practices. These efforts were anchored by the industry's Sustainability Index, which was developed by a working group made up of growers and handlers, and focuses on four priority areas: soil health, water management, sustainable pest management and greenhouse gas emissions.

By developing measurable benchmarks and highlighting grower success stories, the industry aims to strengthen its sustainability narrative and create tools through handlers that help decommo-ditize California walnuts.

## Supporting Sustainability Education

This past year, the CWB hosted four virtual Sustainability Sessions, which provided opportunities for growers to discuss sustainability topics, ask questions and provide feedback on where they would like additional information or support. Each session focused on a topic that aligns with the Sustainability Index.

- Soil Health Sustainability Session (May 2025): Relationships between cover crops, nutrient management and soil health.
- Water Management Sustainability Session (June 2025): Sustainable Groundwater Management Act and sustainable irrigation water management.
- Greenhouse Gas Sustainability Session (July 2025): Data-driven strategies and case studies for reducing greenhouse gas emissions.
- Integrated Pest Management Sustainability Session (August 2025): Reducing chemical inputs, protecting beneficial species and adopting new Department of Pesticide Regulation requirements.

A close-up photograph of walnuts moving along a metal conveyor belt. The walnuts are in sharp focus in the foreground, while the background is blurred. A large, semi-transparent pink circle is overlaid on the left side of the image, containing the text 'FINANCIALS & REPORTING'.

## FINANCIALS & REPORTING

## Programs & Budget

### Program Budget – Actuals

(September 1, 2024 – August 31, 2025)

**2%**

Crop Reports

**12%**

General: Administrative/Programs/  
Meetings/Industry Events

**13%**

Product Research/Grades &  
Standards Activities



**73%**

Domestic Marketing &  
Related Support

**1%**

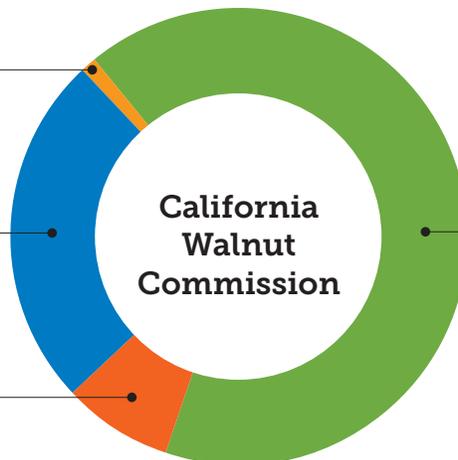
Trade Policy/Issues Managements

**25%**

Health Research/Domestic  
Marketing & Related Support

**8%**

General: Administrative/Programs/  
Meetings/Industry Events



**66%**

Export Marketing  
Development

## Walnut Production

### Global Walnut Production Growth

(2005–2025)



\*Estimate | Source: International Nut & Dried Fruit Council

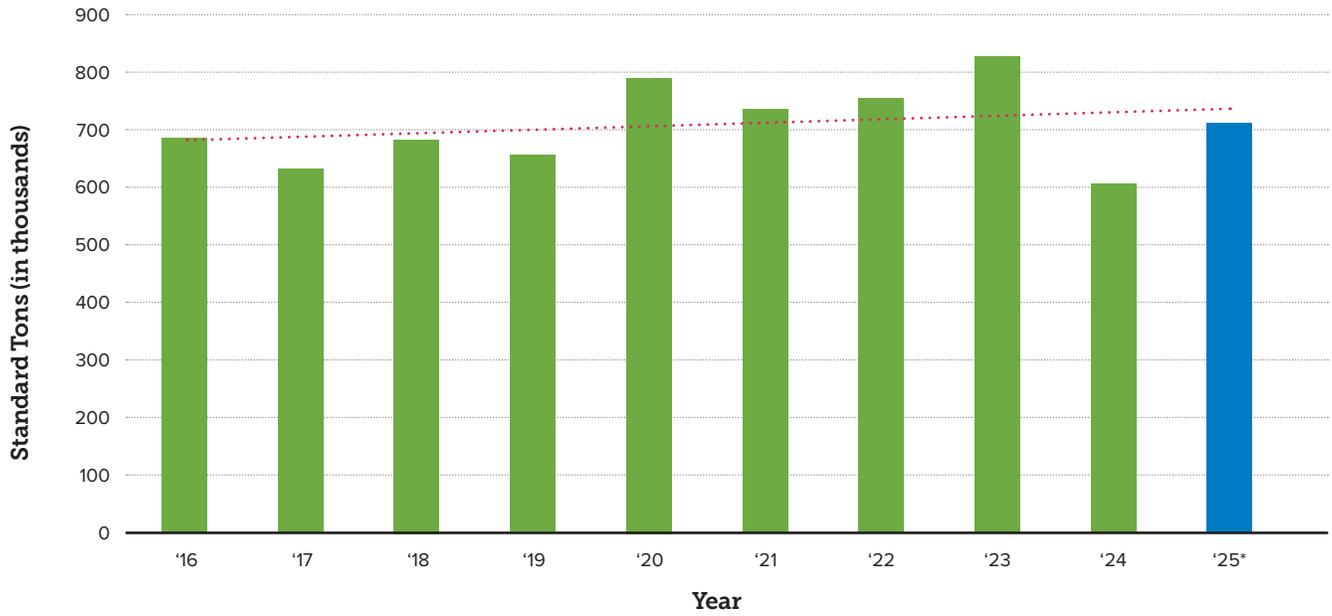
### Estimated World Walnut Production

(In-Shell Basis, Metric Tons)

Country	2024/2025				2025/2026			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
China	50,000	1,550,000	<b>1,600,000</b>	20,000	20,000	1,500,000	<b>1,520,000</b>	60,000
USA	83,000	547,000	<b>630,000</b>	63,000	63,000	645,000	<b>708,000</b>	65,000
Chile	540	134,600	<b>135,140</b>	400	400	168,200	<b>168,600</b>	600
Ukraine	1,000	88,800	<b>89,800</b>	1,600	1,600	100,800	<b>102,400</b>	1,200
Romania	1,000	40,000	<b>41,000</b>	1,200	1,200	53,000	<b>54,200</b>	800
Türkiye	0	48,000	<b>48,000</b>	0	0	40,000	<b>40,000</b>	0
Iran	0	35,000	<b>35,000</b>	0	0	38,700	<b>38,700</b>	0
France	0	25,000	<b>25,000</b>	0	0	35,000	<b>35,000</b>	0
India	10,000	33,000	<b>43,000</b>	3,500	3,500	30,000	<b>33,500</b>	3,000
Argentina	1,000	21,000	<b>22,000</b>	0	0	22,000	<b>22,000</b>	0
Spain	0	13,000	<b>13,000</b>	0	0	19,500	<b>19,500</b>	0
Moldova	300	17,700	<b>18,000</b>	100	100	18,400	<b>18,500</b>	300
Italy	0	14,900	<b>14,900</b>	0	0	15,000	<b>15,000</b>	0
Portugal	0	11,100	<b>11,100</b>	0	0	12,200	<b>12,200</b>	0
Hungary	0	14,000	<b>14,000</b>	0	0	11,900	<b>11,900</b>	200
Others	0	26,000	<b>26,000</b>	0	0	25,300	<b>25,300</b>	0
<b>World Total</b>	<b>146,840</b>	<b>2,619,100</b>	<b>2,765,940</b>	<b>89,800</b>	<b>89,800</b>	<b>2,735,000</b>	<b>2,824,800</b>	<b>131,100</b>
<b>World Consumption (Supply - End. Stock)</b>				<b>2,676,140</b>				

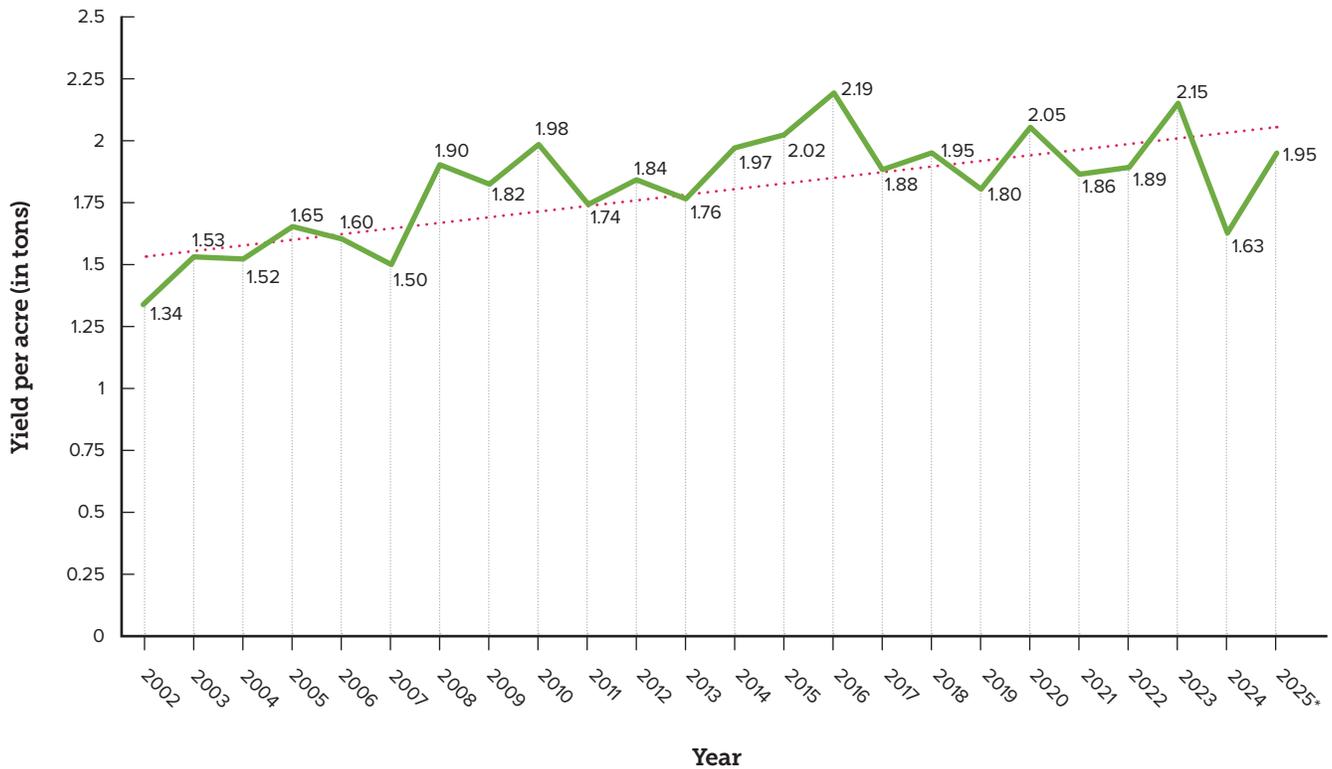
Source: International Nut & Dried Fruit Council

## California Walnut Production Growth



\*NASS Estimate | Source: CWB & CWC, 2025 NASS California Walnut Objective Report

## California Historical Production



\*Estimate | Source: California Walnut Board/2025 NASS California Walnut Objective Measurement Report

## Acreage Reports

### California Walnut Acreage

(2025 standing acreage as of August 31, 2025)

County	Standing Acreage*	Removed Acreage**	Potentially Abandoned Acreage
Alameda	40	0	40
Amador	429	0	72
Butte	51,307	1,220	166
Calaveras	925	0	154
Colusa	23,004	329	49
Contra Costa	395	54	89
El Dorado	190	0	69
Fresno	7,364	475	139
Glenn	38,383	247	36
Kern	91	0	0
Kings	12,270	1,071	400
Lake	4,726	48	2,882
Madera	2,333	72	44
Marin	3	0	0
Mariposa	9	0	5
Mendocino	81	0	61
Merced	6,589	258	174
Monterey	361	0	0
Napa	68	2	52
Nevada	10	0	0

County	Standing Acreage*	Removed Acreage**	Potentially Abandoned Acreage
Placer	4,003	272	111
Sacramento	2,811	0	63
San Benito	1,008	83	244
San Joaquin	65,954	1,583	504
San Luis Obispo	1,461	33	372
Santa Barbara	209	2	20
Santa Clara	502	56	168
Santa Cruz	28	0	6
Shasta	1,443	0	96
Solano	8,993	382	547
Sonoma	90	0	32
Stanislaus	27,115	845	487
Sutter	36,113	412	266
Tehama	32,395	277	344
Tulare	28,781	1,464	594
Ventura	99	0	70
Yolo	10,735	757	571
Yuba	16,982	171	316
<b>Acreage as of August 31, 2025</b>	<b>394,305</b>	<b>10,114</b>	<b>9,242</b>

\*Reflects standing acreage only, including the non-bearing estimate and stressed and potentially abandoned acreage.

\*\*Removals are those observed between September 1, 2024 and August 31, 2025.

Some differences may occur between sheets due to rounding.

Source: CWB/CWC Land IQ acreage study



# Final 2025 Acreage

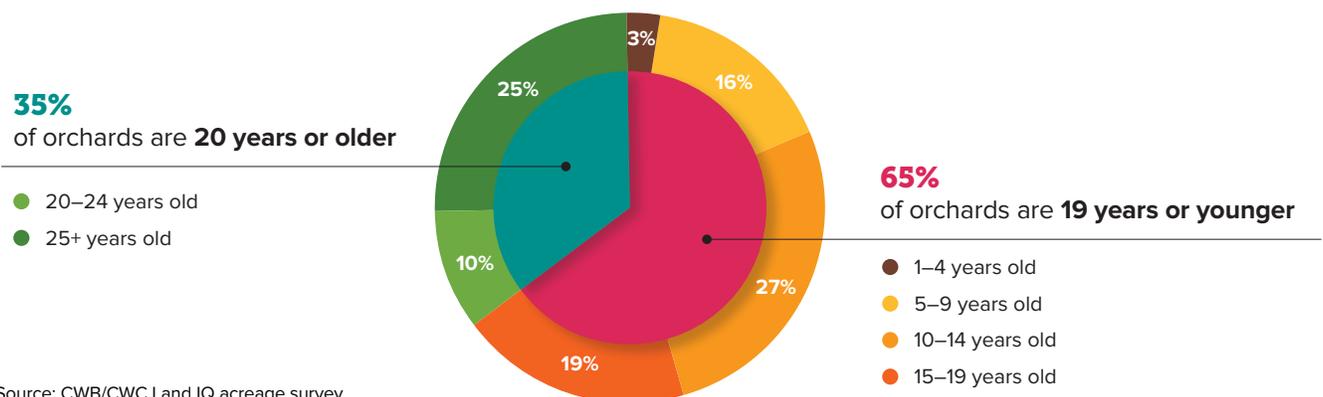
(as of September 1, 2025)

Final	2024 Final	2025 Final	Description
Removed Acreage (September - August)	17,986	10,114	Confirmed aced removed from production.
New Bearing Acreage Coming into Production	15,444	8,471	Previous non-bearing acreage newly coming onto production.
Total Standing Acreage	379,854	394,305	Total standing acreage; includes current 2025 mapping.
Non-bearing Estimate	20,746	14,100	Includes mapped non-bearing orchards from 1 to 4 years old, plus an estimate of very young orchards that have not been detected due to immature status.
Total Standing Acreage	400,600	380,205	Total acreage standing with a bearing age, inclusive of stressed and abandoned acreage outlined below.
High Stress, Likely Abandoned	9,684	9,242	High levels of stress over current or multiple water years. Less likely to be in production.
<b>Final Producing Bearing Acreage Estimate</b>	<b>370,170</b>	<b>370,963</b>	Estimate of bearing acreage likely in production.

Source: CWB/CWC Land IQ acreage survey

## Walnut Orchards by Age

(by county; bearing, non-bearing and total; change vs prior year, 2020–2025)



Source: CWB/CWC Land IQ acreage survey

## Supply, Shipments, Beginning and Ending Inventories (last 5 years)

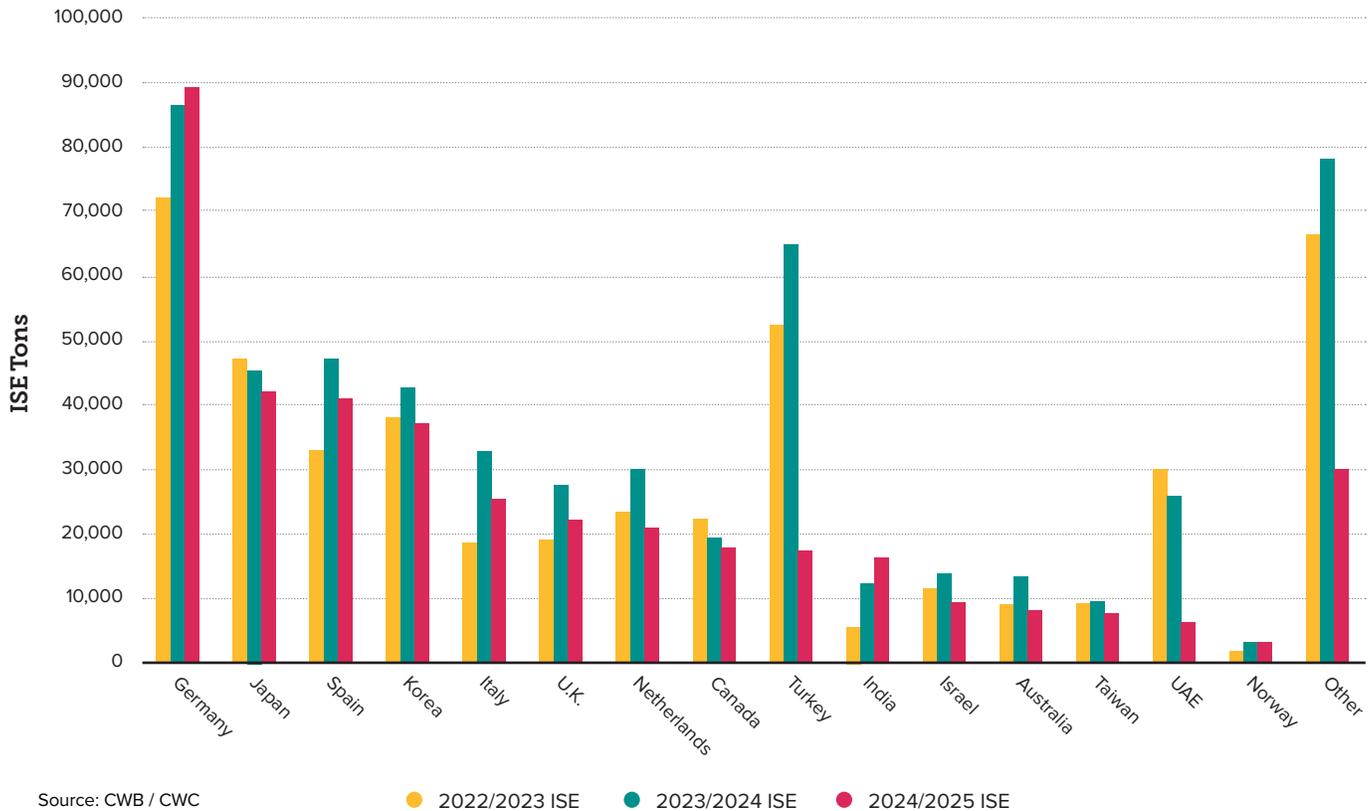
(Industry Snapshot, in standard tons)

Crop Year	New Crop	Carry-In	Total Supply	September – August Sales	% Change in Supply	% Change Sales	Carry-In a % of Total Supply	Sales as a % of Crop
2020	789	64	853	748	18%	14%	8%	95%
2021	735	98	833	691	-2%	-8%	12%	94%
2022	756	138	894	788	7%	14%	15%	104%
2023	828	141	969	873	8%	11%	15%	105%
2024	603	95	698	624	-28%	-29%	14%	103%

Source: CWB / CWC

## Top 15 California Export Markets

(2022–2025, In-shell Equivalents (ISE))



Source: CWB / CWC

● 2022/2023 ISE ● 2023/2024 ISE ● 2024/2025 ISE

# California Walnut Production, Price and Value

(in-shell)

Year	Bearing Acres	Trees per Acres	Per bearing acre	Total production	Price per ton	Total Value
			Tons	Dollars	Dollars (K)	
2004	214,000	60.3	1.52	325,000	1,390	451,750
2005	215,000	61.1	1.65	355,000	1,570	557,350
2006	216,000	62.4	1.60	346,000	1,630	563,980
2007	218,000	62.9	1.50	328,000	2,290	751,120
2008	230,000	65.0	1.90	436,000	1,280	558,080
2009	240,000	65.1	1.82	437,000	1,710	747,270
2010	255,000	67.0	1.98	504,000	2,040	1,028,160
2011	265,000	67.0	1.74	461,000	2,900	1,336,900
2012	270,000	68.6	1.84	497,000	3,030	1,505,910
2013	280,000	69.2	1.76	492,000	3,710	1,825,320
2014	290,000	71.6	1.97	571,000	3,340	1,907,140
2015	300,000	72.0	2.02	606,000	1,670	1,012,020
2016	315,000	73.3	2.19	689,000	1,850	1,274,650
2017	335,000	74.1	1.88	630,000	2,490	1,568,700
2018	350,000	75.5	1.95	683,000	1,350	922,050
2019	365,000	76.9	1.80	657,000	1,890	1,241,730
2020	385,000	76.8	2.05	789,000	1,200	946,800
2021	395,000	78.0	1.86	735,000	1,450	1,065,750
2022	400,000	80.0	1.89	756,000	600	453,600
2023	385,000	81.0	2.15	828,000	870	720,360
2024 <sup>1</sup>	370,000	81.0	1.63	603,000	1,720	1,037,160
2025 <sup>2 3</sup>	365,000	81.0	1.95	710,000	NA	NA

1. Price per ton and total value are May 2025 preliminary data.

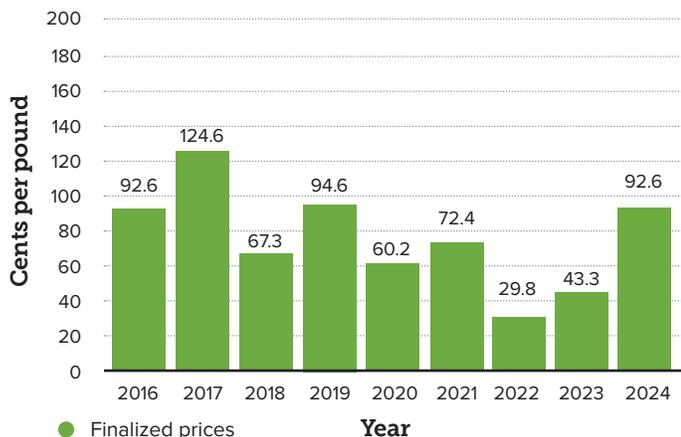
2. Bearing years include plantings of the following: Chandler, Chico, Howard, Ivanhoe, Tulare (2021 & Earlier); Amigo, Ashley, Cisco, Marchetti, Nuggett, Payne, Pedro, Serr, Sunland, Tehama, Trinta, Vina (2020 & Earlier); Franquette, Franquette Scharsch, Mayette, Poe (2018 & Earlier); all other varieties not specified (2019 & Earlier).

3. Price per ton and total value preliminary data will be released May 2026.

Source: USDA /NASS

## Average Walnut Prices

(Finalized prices)



Source: USDA /NASS, Pacific Regional Office – California

## 2024 Walnut Price by Variety

(Finalized Prices, in-shell tons)

Variety	Purchased from producer	Price per pound <sup>1</sup>
	Tons	Cents
Chandler	382,922	96.1
Hartley	10,312	83.9
Howard	92,307	83.5
Ivanhoe	9,576	95.0
Serr	2,863	81.2
Tulare	69,500	87.7
Vina	3,422	72.1
Other	19,604	91.9
<b>Total</b>	<b>590,506</b>	<b>92.6</b>

Note: Varietal totals may not equal due to rounding.

Source: CDFA & USDA/NASS Pacific Regional Office, California



CALIFORNIA WALNUT BOARD & COMMISSION

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